

Hoosier Assurance Plan Instrument - Adults

(HAPI-A)

DOCUMENTATION PAGES

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DEVELOPMENT OF THIS DOCUMENTATION FORM

This documentation form was developed by Kathryn Vanderwater-Piercy, M.A. with full cooperation from Indiana's Division of Mental Health and Addiction. It was developed due to the fact that many agencies have tried to simplify documentation in ways that typically miss the mark on some level and do not decrease the time required for documentation. This documentation form was developed from the HAPI-C scoring instructions in order to standardize "simplification." In order to effectively utilize this documentation form the clinician must still understand the original scoring instructions and still use them for reference. This format was designed to save time for the clinician by organizing the information needed for documentation, and providing scoring criteria, so that the clinician need only "fill in the blank." It is important to note that this documentation form is ***OPTIONAL***.

INSTRUCTIONS

For each item on the HAPI-A with a score of "5" or below use the corresponding documentation page for your written documentation. Simply fill in the box above the scores (if one is provided) and then fill in ALL of the requested information for the ONE score you have chosen. If you find you are having trouble completing the information requested, you may have chosen the incorrect score or are missing information.

AVOID THESE COMMON MISTAKES!

The HAPI-A measures a consumer's functioning (role performance) level.

REMEMBER:

1. Functioning refers to role performance (not bodily functioning).
2. On scores of "4" or "3", support is DIRECT. Care provided by a therapist or physician is not considered direct.
3. Just because a consumer "accepts" help does not automatically make him/her a score of "2." ALL criteria for any score must be met in order to support that score.

Item A: Consumer's Rating of Symptom Distress

Symptoms of distress include:

Score 5: Impairment to role performance is controlled with consistent vigilance and effort (describe)

Score 4: Impairment to role performance is controlled only with extra effort (describe)

And support from others (describe who and type of support)

Score 3: Role performance is impaired (describe)

And support from others is welcomed (describe who and type of support)

And seen as necessary to perform day-to-day functions (describe)

Score 2: Symptoms overwhelm the consumer to the point that role performance is completely impaired (describe)

And the consumer will accept assistance from others (describe who and type of assistance)

Score 1: Symptoms overwhelm the consumer to the point that role performance is completely impaired (describe)

And the consumer is indifferent to or uncooperative with assistance from others (describe who and type of assistance that was refused)

Item B: Anxiety-Worrying

Symptoms of anxiety include:

Score 5: Impairment to role performance is controlled with consistent vigilance and effort (describe)

Score 4: Impairment to role performance is controlled only with extra effort (describe)

And support from others (describe who and type of support)

Score 3: Role performance is impaired (describe)

And support from others is welcomed (describe who and type of support)

And seen as necessary to perform day-to-day functions (describe)

Score 2: Symptoms overwhelm the consumer to the point that role performance is completely impaired (describe)

And the consumer will accept assistance from others (describe who and type of assistance)

Score 1: Symptoms overwhelm the consumer to the point that role performance is completely impaired (describe)

And the consumer is indifferent to or uncooperative with assistance from others (describe who and type of assistance that was refused)

Item C: Depression-Sad, Blue, or Suicidal Thoughts/Actions

Symptoms of depression include:

Score 5: Impairment to role performance is controlled with consistent vigilance and effort (describe)

Score 4: Impairment to role performance is controlled only with extra effort (describe)

And support from others (describe who and type of support)

Score 3: Role performance is impaired (describe)

And support from others is welcomed (describe who and type of support)

And seen as necessary to perform day-to-day functions (describe)

Score 2: Symptoms overwhelm the consumer to the point that role performance is completely impaired (describe)

And the consumer will accept assistance from others (describe who and type of assistance)

Score 1: Symptoms overwhelm the consumer to the point that role performance is completely impaired (describe)

And the consumer is indifferent to or uncooperative with assistance from others (describe who and type of assistance that was refused)

Item D: Health and Physical Status

Physical Symptoms include:

Score 5: Difficulty in performing activities is controlled with consistent vigilance and effort (describe)

Score 4: Difficulty in performing activities is controlled only with extra effort (describe)

And support from others (describe who and type of support)

Score 3: Difficulty in performing activities would lead to negative consequences without help from others (describe)

And support from others is welcomed (describe who and type of support)

And seen as necessary to perform these activities (describe)

Score 2: Performing activities is beyond personal capability (describe)

And the consumer will accept assistance from others (describe who and type of assistance)

Score 1: Performing activities is beyond personal capability (describe)

And the consumer is indifferent to or uncooperative with assistance from others (describe who and type of assistance that was refused)

Item E: Occupational Functioning

Meaningful activities include:

Score 5: Difficulty in performing these activities is controlled with consistent vigilance and effort (describe)

Score 4: Difficulty in performing these activities is controlled only with extra effort (describe)

And support from others (describe who and type of support)

Score 3: Difficulty with these activities is at a level that would lead to negative consequences without direct help from others (describe)

And support from others is welcomed and seen as necessary (describe who and type of support)

And in a work situation performance is directed and closely monitored (describe)

Score 2: Taking responsibility for meaningful activity appears to be beyond the consumer's capability (describe)

And the consumer will permit others to supervise his/her activities (describe who and type of assistance)

Score 1: Taking responsibility for meaningful activity appears to be beyond the consumer's capability (describe)

And the consumer is indifferent to or uncooperative with assistance from others (describe who and type of assistance that was refused)

Item F: Daily Functioning & Independent Living Skills

Daily functioning/living skills affected include:

Score 5: Impairment to these skills is controlled with consistent vigilance and effort (describe)

Score 4: Impairment to these skills is controlled only with extra effort (describe)

And support from others (describe who and type of support)

Score 3: Difficulty with these skills is at a level that would lead to negative consequences without direct help from others (describe)

And support from others is welcomed and seen as necessary (describe who and type of support)

Score 2: Taking responsibility for these skills appears to be beyond the consumer's capability (describe)

And the consumer will permit others to supervise these skills (describe who and type of assistance)

Score 1: Taking responsibility for these skills appears to be beyond the consumer's capability (describe)

And the consumer is indifferent to or uncooperative with assistance from others (describe who and type of assistance that was refused)

Item G: Time & Task Orientation & Learning Ability

Thinking/remembering is impaired (describe):

Score 5: Difficulty in performing activities is controlled with consistent vigilance and effort (describe)

Score 4: Difficulty in performing activities is controlled only with extra effort (describe)

And support from others (describe who and type of support)

Score 3: Difficulty with activities is at a level that would lead to negative consequences without direct help from others (describe)

And support from others is welcomed and seen as necessary (describe who and type of support)

And in a work situation performance is directed and closely monitored (describe)

Score 2: Taking responsibility for performing activities appears to be beyond the consumer's capability (describe)

And the consumer will permit others to supervise his/her activities (describe who and type of assistance)

Score 1: Taking responsibility for activities appears to be beyond the consumer's capability (describe)

And the consumer is indifferent to or uncooperative with assistance from others (describe who and type of assistance that was refused)

Item H: Thought Disorder

Symptoms of thought disorder include:

Score 5: Difficulty in performing activities is controlled with consistent vigilance and effort (describe)

Score 4: Difficulty in performing activities is controlled only with extra effort (describe)

And support from others (describe who and type of support)

Score 3: Difficulty with these activities is at a level that would lead to negative consequences without direct help from others (describe)

And support from others is welcomed and seen as necessary (describe who and type of support)

And in a work situation performance is directed and closely monitored (describe)

Score 2: Taking responsibility for performing these activities appears to be beyond the consumer's capability (describe)

And the consumer will permit others to supervise his/her activities (describe who and type of assistance)

Score 1: Taking responsibility for meaningful activity appears to be beyond the consumer's capability (describe)

And the consumer is indifferent to or uncooperative with assistance from others (describe who and type of assistance that was refused)

Item I: Social-Family Support & Interpersonal Relations

Relationship difficulties occur with the following people:

Score 5: Sustaining social-family support/relationships is possible with consistent vigilance and effort (describe)

Score 4: Sustaining social-family support/relationships is possible with consistent vigilance and effort (describe

And support from others (describe who and type of support)

Score 3: Sustaining social-family support/relationships is difficult at most all encounters (describe)

And support from others is welcomed and seen as necessary to sustain positive interactions with others (describe who and type of support)

Score 2: The consumer is actively avoided by others or he/she actively avoids others (describe)

And positive interactions are possible with active assistance (describe who and type of assistance)

Score 1: The consumer is actively avoided by others or he/she actively avoids others (describe)

And the consumer resists assistance from others (describe who and type of assistance that was refused)

Item J: Consumer's Satisfaction with Living Arrangement

Symptoms of *distress* related solely to living arrangement include:

Score 5: Impairment to role performance (including moving) is controlled with consistent vigilance and effort (describe)

Score 4: Impairment to role performance (including moving) is controlled only with extra effort (describe)

And support from others (describe who and type of support)

Score 3: Role performance (including moving) is impaired in several areas (describe)

And role performance (including moving) is at a level that would lead to negative consequences without direct help from others (describe who and type of support)

And support from others is welcomed and seen necessary to stay or move (describe)

Score 2: Symptoms overwhelm the consumer to the point that role performance is completely impaired (describe)

And the consumer will accept assistance from others (describe who and type of assistance)

Score 1: Symptoms overwhelm the consumer to the point that role performance is completely impaired (describe)

And the consumer is indifferent to or uncooperative with assistance from others (describe who and type of assistance that was refused)

Item K: Victimization

Types of victimization/abuse include: (describe)

Score 5: Impairment to role performance is controlled with consistent vigilance and effort (describe)

Score 4: Impairment to role performance is controlled only with extra effort (describe)

And support from others (describe who and type of support)

Score 3: Impaired role performance is evident: (describe)

And the consumer recognizes that danger exists but does not understand how to change the situation without assistance (describe)

Score 2: Role performance is completely impaired (describe)

And the consumer recognizes that danger exists but does not understand how to change the situation without assistance (describe)

Score 1: Role performance is completely impaired (describe)

And the consumer does not recognize that danger exists and therefore requires close supervision and support (describe)

Item L: Disruptive-Inappropriate Behavior

Behaviors that “bother” others include:

Score 5: The consumer can control impulses to engage in these behaviors with consistent vigilance and effort (describe)

Score 4: The consumer can control impulses to engage in these behaviors with extra effort (describe)

And support from others (describe who and type of support)

Score 3: Difficulty in controlling impulses to engage in these behaviors is at a level that would lead to negative consequences without direct help from others (describe)

And support from others is welcomed (describe who and type of support)

And seen as necessary to perform day-to-day functions (describe)

Score 2: Controlling impulses to engage in these behaviors is beyond the capability of the consumer (describe)

And the consumer will permit others to direct his/her activities very closely (describe who and type of direction)

Score 1: Controlling impulses to engage in these behaviors is beyond the capability of the consumer (describe)

And the consumer is indifferent to or uncooperative with assistance from others (describe who and type of assistance that was refused)

Item M: Risk Behavior

Risk behaviors (thoughts, actions or impulses) include:

Score 5: The consumer can control thoughts, actions or impulses with consistent vigilance and effort (describe)

Score 4: The consumer can control thoughts, actions or impulses with extra effort (describe)

And support from others (describe who and type of support)

Score 3: Difficulty in controlling thoughts, actions or impulses is at a level that would lead to negative consequences without direct help from others (describe)

And support from others is welcomed (describe who and type of support)

And seen as necessary to avoid these thoughts, actions or impulses (describe)

Score 2: Difficulty in controlling thoughts, actions or impulses is beyond the capability of the consumer (describe)

And the consumer will permit others to direct his/her activities very closely (describe who and type of direction)

Score 1: Controlling impulses to engage in these behaviors is beyond the capability of the consumer (describe)

And the consumer is indifferent to or uncooperative with assistance from others (describe who and type of assistance that was refused)

Item N1: Substance Abuse-Alcohol Use Last 30 Days

Score 5: The consumer uses alcohol but avoids inappropriate use and related problems (describe)

Score 4: The consumer uses alcohol with evidence of immediate or recurrent social, occupational, psychological or physical problems (describe)

And the consumer recognizes his/her use is problematic and is able to control use with considerable effort (describe)

And support from others (describe who and type of support)

Score 3: The consumer uses alcohol with evidence of immediate or recurrent social, occupational, psychological or physical problems (describe)

And the consumer recognizes his/her use is problematic and is able to control use with constant effort (describe)

And ready access to support from others (describe who and type of support)

Score 2: The consumer uses alcohol with evidence of immediate or recurrent social, occupational, psychological or physical problems PLUS evidence of greater amounts or duration than intended (describe)

And the consumer spends much time obtaining or using alcohol; or current intoxication/withdrawal interfering with activities; or continued use despite knowledge of alcohol related problems; or marked tolerance; or withdrawal symptoms; or use to avoid withdrawal symptoms (underline areas and describe)

And the consumer recognizes he/she has a problem and will accept help (describe who and type of help)

Score 1: The consumer uses alcohol with evidence of immediate or recurrent social, occupational, psychological or physical problems PLUS evidence of greater amounts/duration than intended (describe)

And the consumer spends much time obtaining or using alcohol; or current intoxication/withdrawal interfering with activities; or continued use despite knowledge of alcohol related problems; or marked tolerance; or withdrawal symptoms; or use to avoid withdrawal symptoms (underline areas and describe)

And the consumer does not appear to recognize the seriousness of the problem and will resist assistance from others (describe who and type of assistance that was refused)

Item N2: Substance Abuse-Alcohol use last 48 hours

Score 5: The consumer uses alcohol but avoids inappropriate use and related problems (describe)

Score 4: The consumer uses alcohol with evidence of immediate or recurrent social, occupational, psychological or physical problems (describe)

And the consumer recognizes his/her use is problematic and is able to control use with considerable effort (describe)

And support from others (describe who and type of support)

Score 3: The consumer uses alcohol with evidence of immediate or recurrent social, occupational, psychological or physical problems (describe)

And the consumer recognizes his/her use is problematic and is able to control use with constant effort (describe)

And ready access to support from others (describe who and type of support)

Score 2: The consumer uses alcohol with evidence of immediate or recurrent social, occupational, psychological or physical problems PLUS evidence of greater amounts/duration than intended (describe)

And the consumer spends much time obtaining or using alcohol; or current intoxication/withdrawal interfering with activities; or continued use despite knowledge of alcohol related problems; or marked tolerance; or withdrawal symptoms; or use to avoid withdrawal symptoms (underline areas and describe)

And the consumer recognizes he/she has a problem and will accept help (describe who and type of help)

Score 1: The consumer uses alcohol with evidence of immediate or recurrent social, occupational, psychological or physical problems PLUS evidence of greater amounts/duration than intended (describe)

And the consumer spends much time obtaining or using alcohol; or current intoxication/withdrawal interfering with activities; or continued use despite knowledge of alcohol related problems; or marked tolerance; or withdrawal symptoms; or use to avoid withdrawal symptoms (underline areas and describe)

And the consumer does not appear to recognize the seriousness of the problem and will resist assistance from others (describe who and type of assistance that was refused)

Item N3: Substance Abuse-Drug Use Last 30 days

Score 5: The consumer uses drugs but avoids inappropriate use and related problems (describe)

Score 4: The consumer uses drugs with evidence of immediate or recurrent social, occupational, psychological or physical problems (describe)

And the consumer recognizes his/her use is problematic and is able to control use with considerable effort (describe)

And support from others (describe who and type of support)

Score 3: The consumer uses drugs with evidence of immediate or recurrent social, occupational, psychological or physical problems (describe)

And the consumer recognizes his/her use is problematic and is able to control use with constant effort (describe)

And ready access to support from others (describe who and type of support)

Score 2: The consumer uses drugs with evidence of immediate or recurrent social, occupational, psychological or physical problems PLUS evidence of greater amounts/duration than intended (describe)

And the consumer spends much time obtaining or using drugs; or current intoxication/withdrawal interfering with activities; or continued use despite knowledge of drug related problems; or marked tolerance; or withdrawal symptoms; or use to avoid withdrawal symptoms (underline areas and describe)

And the consumer recognizes he/she has a problem and will accept help (describe who and type of help)

Score 1: The consumer uses drugs with evidence of immediate or recurrent social, occupational, psychological or physical problems PLUS evidence of greater amounts/duration than intended (describe)

And the consumer spends much time obtaining or using drugs; or current intoxication/withdrawal interfering with activities; or continued use despite knowledge of drug related problems; or marked tolerance; or withdrawal symptoms; or use to avoid withdrawal symptoms (underline areas and describe)

And the consumer does not appear to recognize the seriousness of the problem and will resist assistance from others (describe who and type of assistance that was refused)

Item N4: Substance Abuse-Drug Use Last 48 Hours

Score 5: The consumer uses drugs but avoids inappropriate use and related problems (describe)

Score 4: The consumer uses drugs with evidence of immediate or recurrent social, occupational, psychological or physical problems (describe)

And the consumer recognizes his/her use is problematic and is able to control use with considerable effort (describe)

And support from others (describe who and type of support)

Score 3: The consumer uses drugs with evidence of immediate or recurrent social, occupational, psychological or physical problems (describe)

And the consumer recognizes his/her use is problematic and is able to control use with constant effort (describe)

And ready access to support from others (describe who and type of support)

Score 2: The consumer uses drugs with evidence of immediate or recurrent social, occupational, psychological or physical problems PLUS evidence of greater amounts/duration than intended (describe)

And the consumer spends much time obtaining or using drugs; or current intoxication/withdrawal interfering with activities; or continued use despite knowledge of drug related problems; or marked tolerance; or withdrawal symptoms; or use to avoid withdrawal symptoms (underline areas and describe)

And the consumer recognizes he/she has a problem and will accept help (describe who and type of help)

Score 1: The consumer uses drugs with evidence of immediate or recurrent social, occupational, psychological or physical problems PLUS evidence of greater amounts/duration than intended (describe)

And the consumer spends much time obtaining or using drugs; or current intoxication/withdrawal interfering with activities; or continued use despite knowledge of drug related problems; or marked tolerance; or withdrawal symptoms; or use to avoid withdrawal symptoms (underline areas and describe)

And the consumer does not appear to recognize the seriousness of the problem and will resist assistance from others (describe who and type of assistance that was refused)

Item N5: Substance Abuse-Drug/Alcohol Use Last 2-12 Months

Score 5: The consumer uses alcohol/drugs but avoids inappropriate use and related problems (describe)

Score 4: The consumer uses alcohol/drugs with evidence of immediate or recurrent social, occupational, psychological or physical problems (describe)

And the consumer recognizes his/her use is problematic and is able to control use with considerable effort (describe)

And support from others (describe who and type of support)

Score 3: The consumer uses alcohol/drugs with evidence of immediate or recurrent social, occupational, psychological or physical problems (describe)

And the consumer recognizes his/her use is problematic and is able to control use with constant effort (describe)

And ready access to support from others (describe who and type of support)

Score 2: The consumer uses alcohol/drugs with evidence of immediate or recurrent social, occupational, psychological or physical problems PLUS evidence of greater amounts/duration than intended (describe)

And the consumer spends much time obtaining or using alcohol/drugs; or current intoxication/withdrawal interfering with activities; or continued use despite knowledge of drug related problems; or marked tolerance; or withdrawal symptoms; or use to avoid withdrawal symptoms (underline areas and describe)

And the consumer recognizes he/she has a problem and will accept help (describe who and type of help)

Score 1: The consumer uses alcohol/drugs with evidence of immediate or recurrent social, occupational, psychological or physical problems PLUS evidence of greater amounts/duration than intended (describe)

And the consumer spends much time obtaining or using alcohol/drugs; or current intoxication/withdrawal interfering with activities; or continued use despite knowledge of drug related problems; or marked tolerance; or withdrawal symptoms; or use to avoid withdrawal symptoms (underline areas and describe)

And the consumer does not appear to recognize the seriousness of the problem and will resist assistance from others (describe who and type of assistance that was refused)

Item N6: Substance Abuse-Drug/Alcohol Use Over Lifetime (exclude past year)

Score 5: The consumer uses alcohol/drugs but avoids inappropriate use and related problems (describe)

Score 4: The consumer uses alcohol/drugs with evidence of immediate or recurrent social, occupational, psychological or physical problems (describe)

And the consumer recognizes his/her use is problematic and is able to control use with considerable effort (describe)

And support from others (describe who and type of support)

Score 3: The consumer uses alcohol/drugs with evidence of immediate or recurrent social, occupational, psychological or physical problems (describe)

And the consumer recognizes his/her use is problematic and is able to control use with constant effort (describe)

And ready access to support from others (describe who and type of support)

Score 2: The consumer uses alcohol/drugs with evidence of immediate or recurrent social, occupational, psychological or physical problems PLUS evidence of greater amounts/duration than intended (describe)

And the consumer spends much time obtaining or using alcohol/drugs; or current intoxication/withdrawal interfering with activities; or continued use despite knowledge of drug related problems; or marked tolerance; or withdrawal symptoms; or use to avoid withdrawal symptoms (underline areas and describe)

And the consumer recognizes he/she has a problem and will accept help (describe who and type of help)

Score 1: The consumer uses alcohol/drugs with evidence of immediate or recurrent social, occupational, psychological or physical problems PLUS evidence of greater amounts/duration than intended (describe)

And the consumer spends much time obtaining or using alcohol/drugs; or current intoxication/withdrawal interfering with activities; or continued use despite knowledge of drug related problems; or marked tolerance; or withdrawal symptoms; or use to avoid withdrawal symptoms (underline areas and describe)

And the consumer does not appear to recognize the seriousness of the problem and will resist assistance from others (describe who and type of assistance that was refused)

Item O: Reliance on Services to Maintain Community Functioning

Our services for this consumer include:

Score 5: Without services the consumer will manifest mild impairment in at least one major life area (state life area)

Score 4: Without services the consumer will manifest mild impairment in at least one major life area (state life area)

And the impairment is noticeable to self or others (describe who will notice and how)

Score 3: Without services the consumer will manifest impairment in more than one major life area (state life areas)

And definite negative consequences include:

Score 2: Without services the consumer will manifest impairment in at least one major life area (state life area)

And danger to self or others includes:

Score 1: Without services the consumer will manifest impairment in more than one major life area (state life areas)

And danger to self or others includes: